

**Completing a New Hire Overview**

This business process is applicable to both Health Benefits Only (HBO) Agencies and localities in The Local Choice (TLC) Benefit Program.

All required information must be entered using the tabs on the page or the transaction cannot be saved.

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### Adding a New Hire

If you are part of Release 1, go directly to step 7 to enter the newly created PMIS Employee ID as steps 1 – 6 are completed prior to requesting a new PMIS ID from OHB.

Before beginning, the applicable employee's Social Security Number (SSN) must be available for immediate reference. This process is performed to validate that the new employee is not currently in the Cardinal system, or to obtain the existing Employee ID if the employee is already in the system.

1. Navigate to the **Add a Person** page using the following path to search for matching persons:

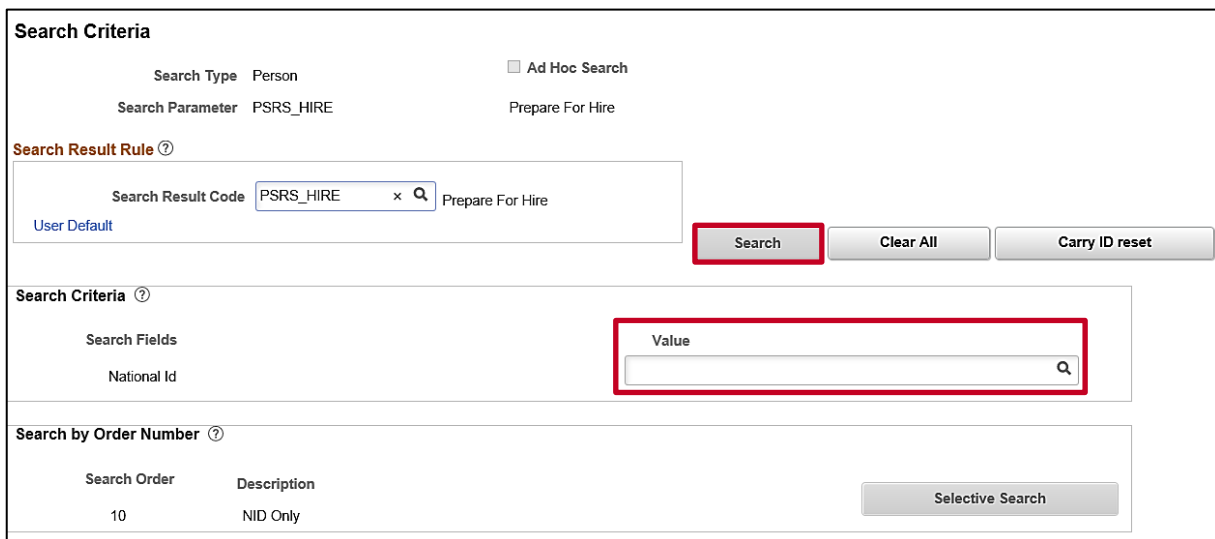
**Navigator > Workforce Administration > Personal Information > Add a Person**

The **Add a Person** page displays.



2. Click the **Search for Matching Persons** link.

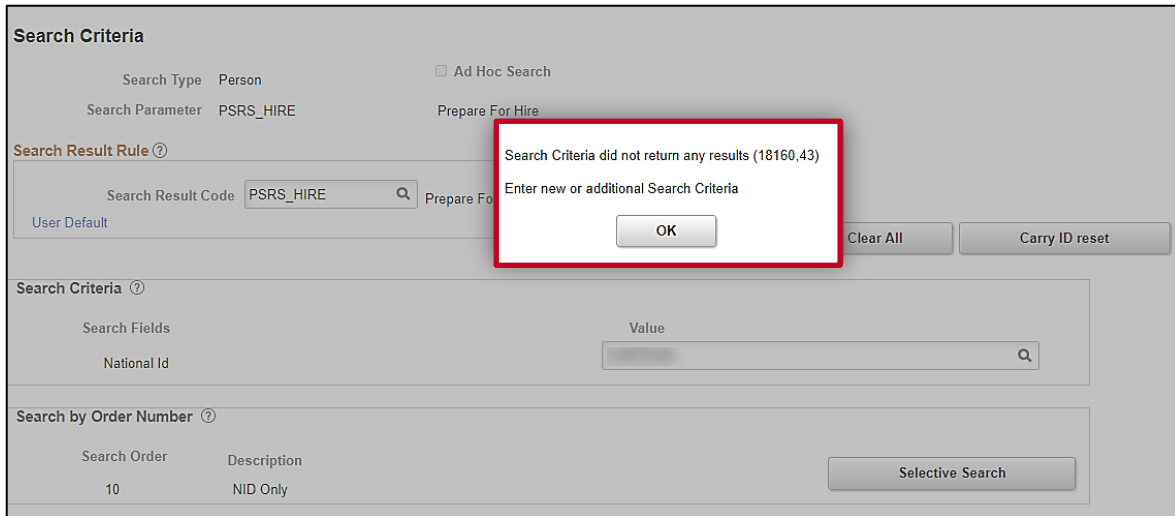
The **Search Criteria** page displays.



3. Enter the employee's SSN into the **Value** field.
4. Press the **Tab** key on the keyboard to enable the **Search** button.
5. The SSN is reformatted automatically (i.e. dashes are removed if they were entered). Click the **Search** button.

The **Search Results** page displays in a pop-up window.

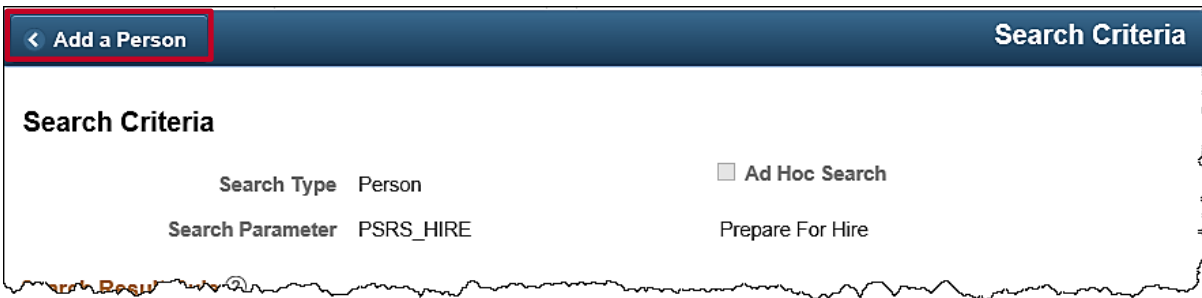
**Note:** The message depicted below displays when the employee's SSN is not already in the Cardinal system. In these cases, proceed to Step 6 of this Job Aid. If the system displays an Employee ID, the employee already exists in the Cardinal system and a termination of the previous record should be completed by the sending Agency.



The screenshot shows the 'Search Criteria' page. A red box highlights a pop-up message that reads: 'Search Criteria did not return any results (18160,43). Enter new or additional Search Criteria.' Below the message is an 'OK' button. The background page shows search options like 'Search Type: Person', 'Search Parameter: PSRS\_HIRE', and 'Prepare For Hire'.

6. Click the **Ok** button to close the pop-up window.

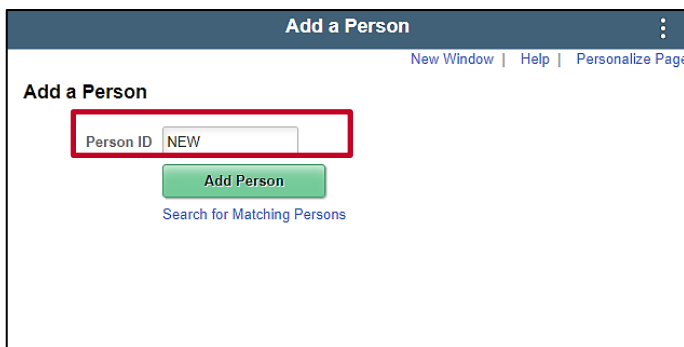
The **Search Criteria** page returns.



The screenshot shows the 'Search Criteria' page. A red box highlights the 'Add a Person' tab in the top left-hand corner. The page title is 'Search Criteria'.

7. Click the **Add a Person** tab in the top left-hand corner of the page.

The **Add a Person** page returns.

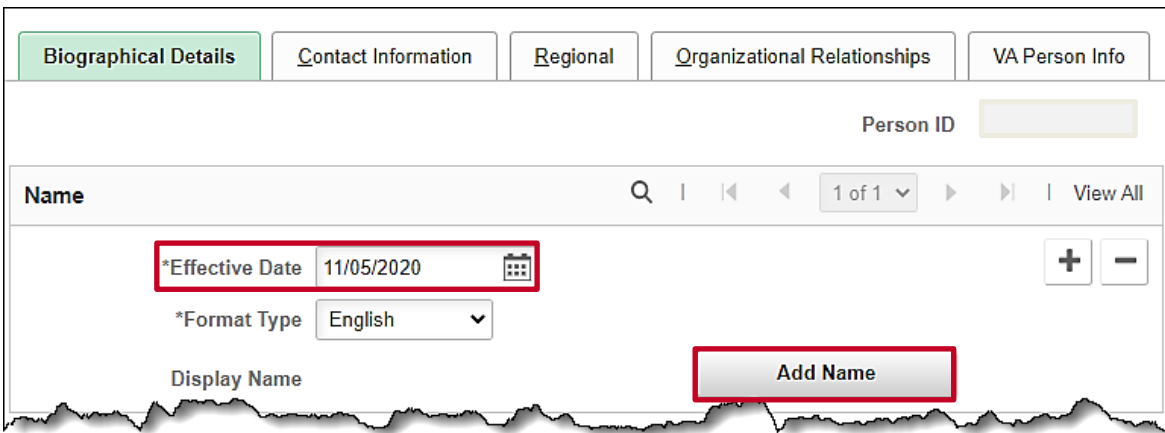


The screenshot shows the 'Add a Person' page. A red box highlights the 'Person ID' field, which contains the text 'NEW'. Below the field is a green 'Add Person' button and a link that says 'Search for Matching Persons'.

8. Enter the New Employee ID in the Person ID field.

9. Click the **Add Person** button.

The **Modify a Person** page displays with the **Biographical Details** tab displayed by default.

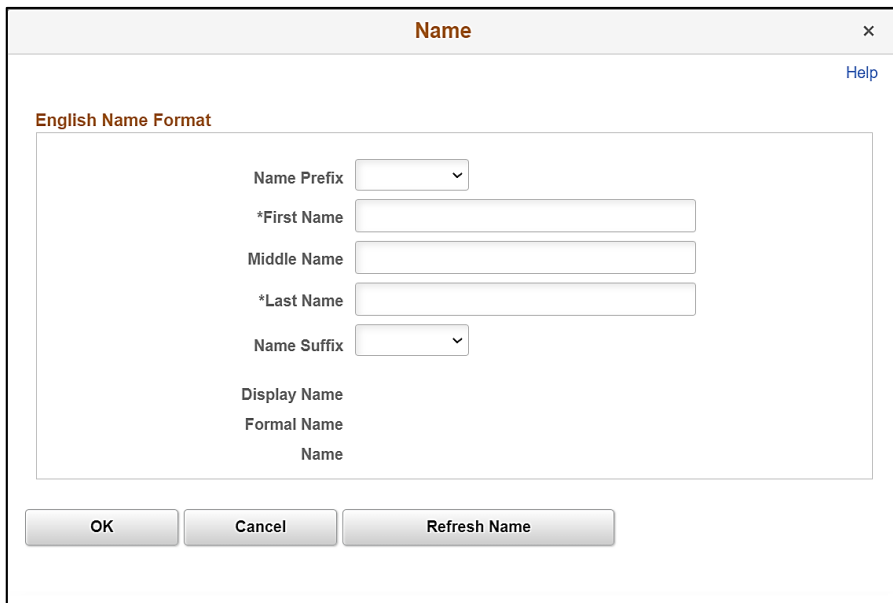


10. The **Effective Date** field defaults to the current date. Update this date to the applicable date of the new hire using the **Calendar** icon if required.

**Note:** For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

11. Click the **Add Name** button.

The **Name** page displays in a pop-up window.

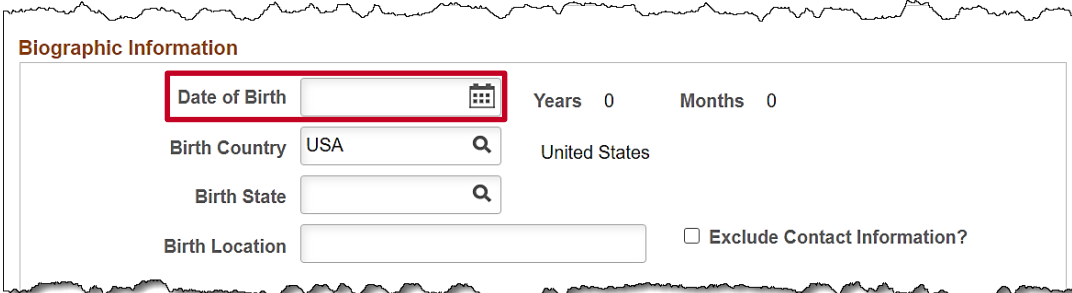


12. Select the applicable prefix using the **Name Prefix** field dropdown button (optional).
13. Enter the employee's first name in the **First Name** field (required).
14. Enter the employee's middle name in the **Middle Name** field (optional).
15. Enter the employee's last name in the **Last Name** field (required).

## HR352 Completing a New Hire

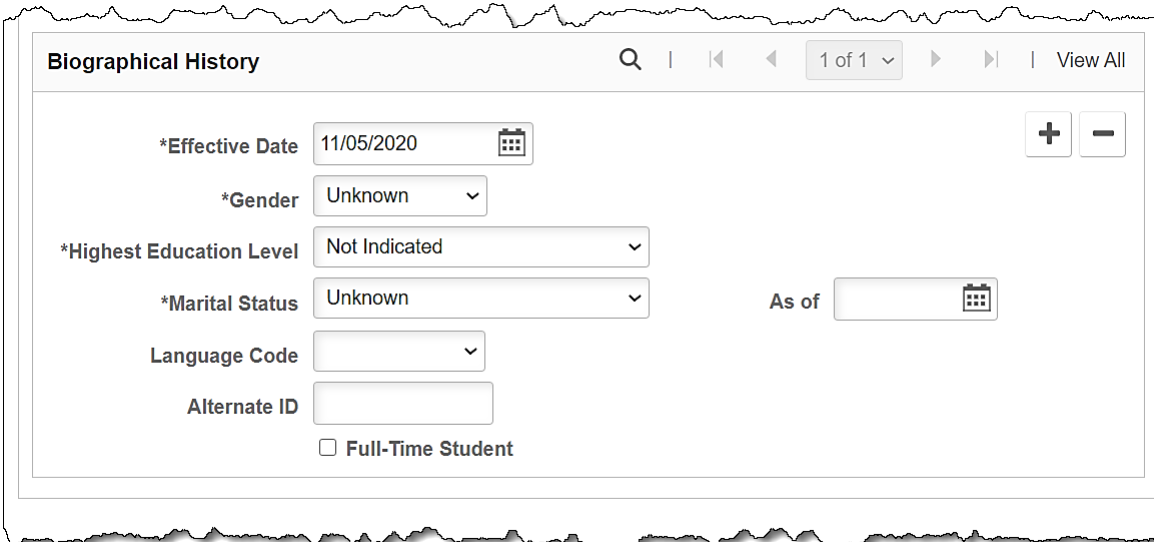
16. Select the applicable suffix using the **Name Suffix** field dropdown button (optional).
17. Click the **Refresh Name** button. The **Display Name**, **Formal Name**, and **Name** fields will auto-populate based on the information entered.
18. Click the **OK** button.

The **Modify a Person** page returns. Scroll down to the **Biographic Information** section as required.



19. Select the employee's date of birth (required) using the **Date of Birth Calendar** icon.
20. The **Birth Country** field defaults to "USA". Update as needed using the **Look Up** icon.
21. Complete the **Birth State** and **Birth Location** fields (optional).
22. Scroll down to the **Biographical History** section.

The **Biographical History** section displays.



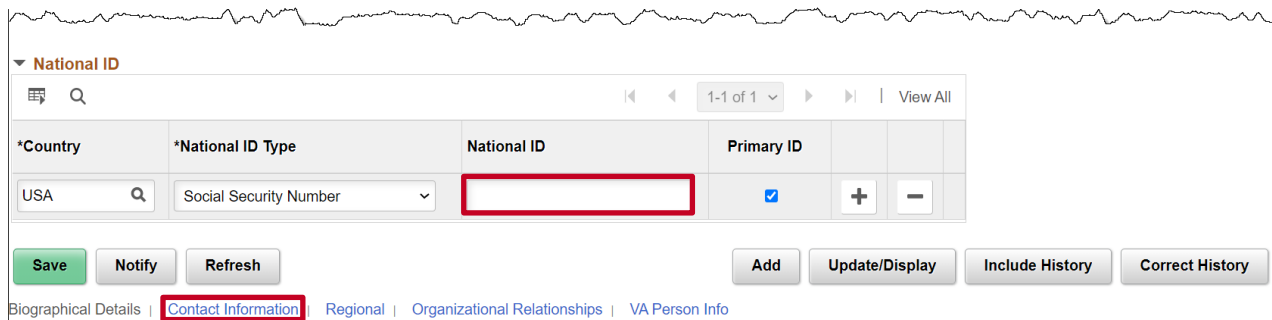
23. The **Effective Date** field within this section defaults to the current date. Update this date to the applicable date of the new hire using the **Calendar** icon if required.

**Note:** For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

## HR352 Completing a New Hire

24. The **Gender** field is a required field for benefits purposes and defaults to "Unknown". Select the legal gender of the employee using the dropdown button.
25. The **Highest Education Level** field is a required field and defaults to "Not Indicated". Select the employee's highest level of education using the dropdown button.
26. The **Marital Status** field is a required field for benefits purposes and defaults to "Unknown". Select the legal marital status of the employee using the dropdown button.
27. Select the effective date for the employee's marital status using the **As of Calendar** icon to the right of the **Marital Status** field.
28. The **Language Code**, **Alternate ID**, and **Full-Time Student** fields are not currently tracked or used in Cardinal.
29. Scroll down to the **National ID** section as needed.

The **National ID** section displays.

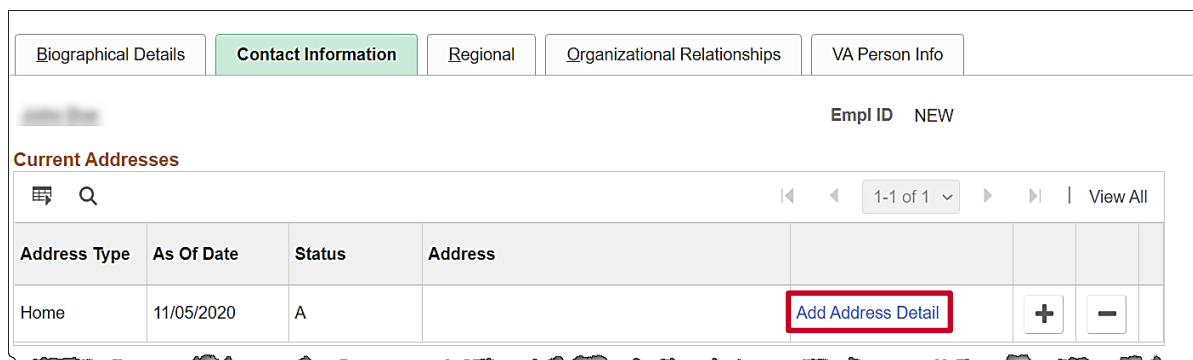


30. Enter the employee's SSN in the **National ID** field.

**Note:** If the Employee ID and the Social Security Number are not the same combination that was entered into PMIS the day before, the transaction can't be completed.

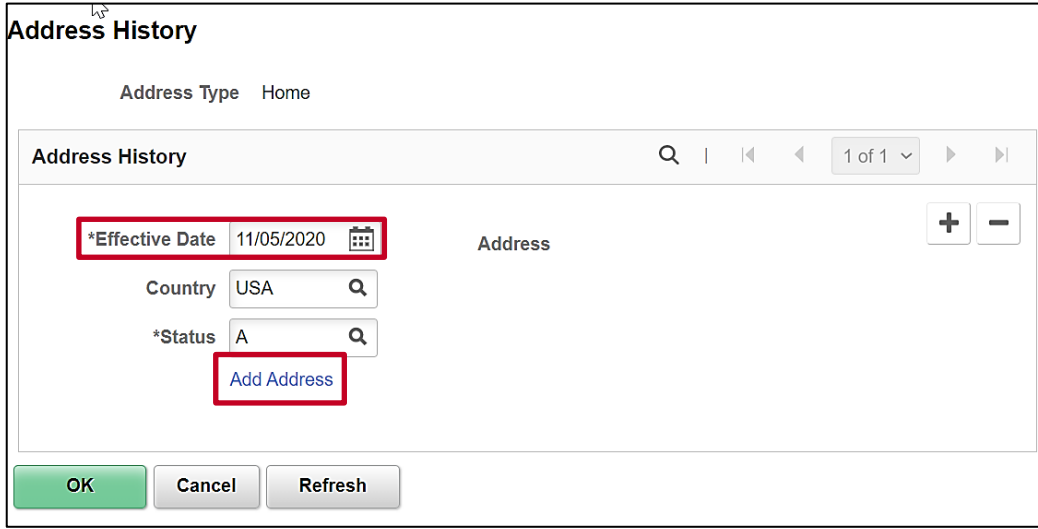
31. Click the **Contact Information** link.

The **Contact Information** tab displays.



32. Click the **Add Address Detail** link.

The **Address History** page displays.

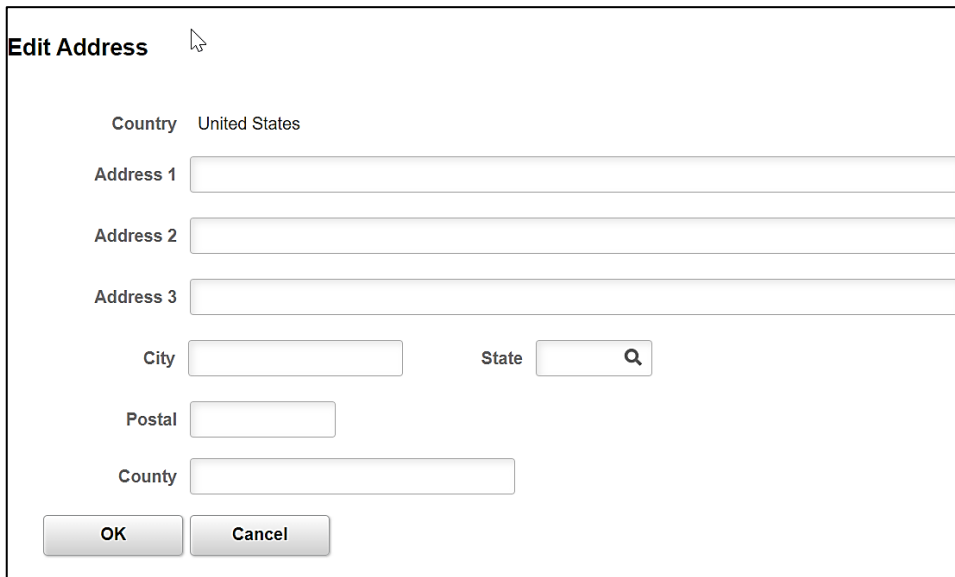


33. The **Effective Date** field within this section defaults to the previously selected Effective Date on the **Biographical Details** tab. Update this date to the applicable date of the new hire using the **Effective Date Calendar** icon if required.

**Note:** For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

34. Click the **Add Address** link.

The **Edit Address** page displays.



35. Enter the employee's address information using the applicable fields.
36. Click the **OK** button.

The **Address History** page returns with the address information displayed.

**Address History**

Address Type   Home

Address History
 Q
|
◀
▶
1 of 1

\*Effective Date
 
📅

Country
 
Q

\*Status
 
Q

[Add Address](#)

Address
 101 Main Street  
 Richmond, VA 23234
 +
-

OK
Cancel
Refresh

37. Click the **OK** button.

The **Contact Information** tab returns.

Biographical Details   **Contact Information**   Regional   Organizational Relationships   VA Person Info

[Employee Name]   Empl ID   NEW

**Current Addresses**

📄
Q
◀
▶
1-1 of 1
View All

Address Type	As Of Date	Status	Address			
Home	11/05/2020	A	101 Main Street Richmond, VA 23234	<a href="#">Edit/View Address Detail</a>	<span>+</span>	<span>-</span>

**Phone Information**

📄
Q
◀
▶
1-1 of 1
View All

*Phone Type	Telephone	Extension	Preferred		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<span>+</span>	<span>-</span>

38. Select the type of phone using the **Phone Type** field dropdown button.

39. Enter the applicable telephone number in the **Telephone** field.

**Note:** It is not necessary to enter dashes. When you tab out of the field, the appropriate phone number format will auto-populate.

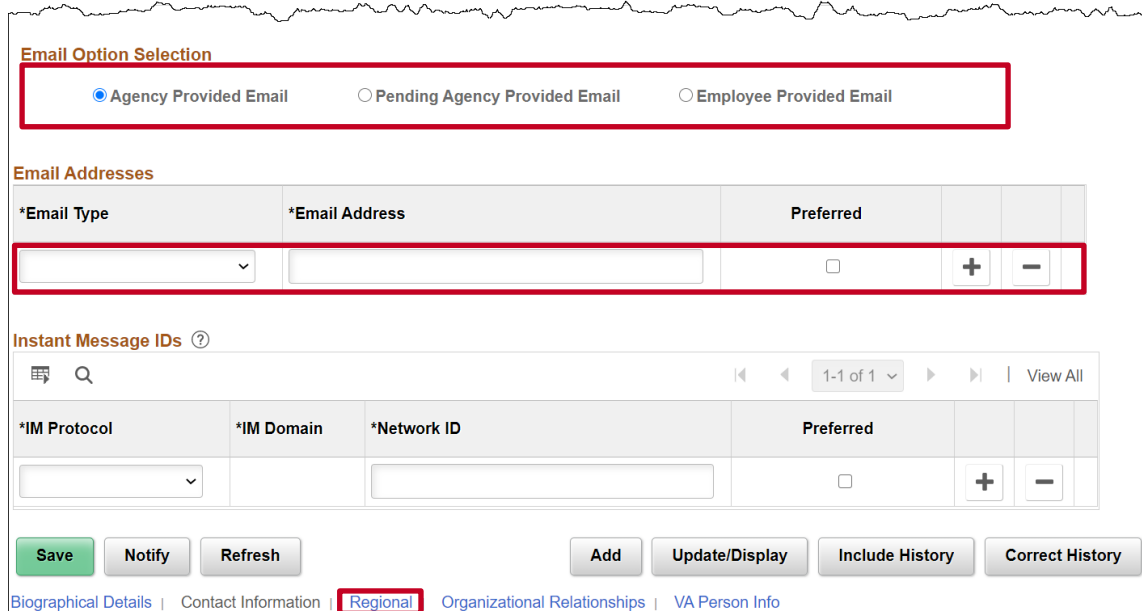
40. Select the **Preferred** checkbox option if applicable.

41. Add additional phone numbers for the employee as needed by clicking the **Add a New Row** icon (+), and then repeating Steps 37 – 39.

42. Scroll down as needed to the **Email Option Selection** and **Email Addresses** sections.



The **Email Option Selection** and **Email Addresses** sections display.



**Email Option Selection**

☒ Agency Provided Email
 ☐ Pending Agency Provided Email
 ☐ Employee Provided Email

**Email Addresses**

*Email Type	*Email Address	Preferred		
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	+	-

**Instant Message IDs**

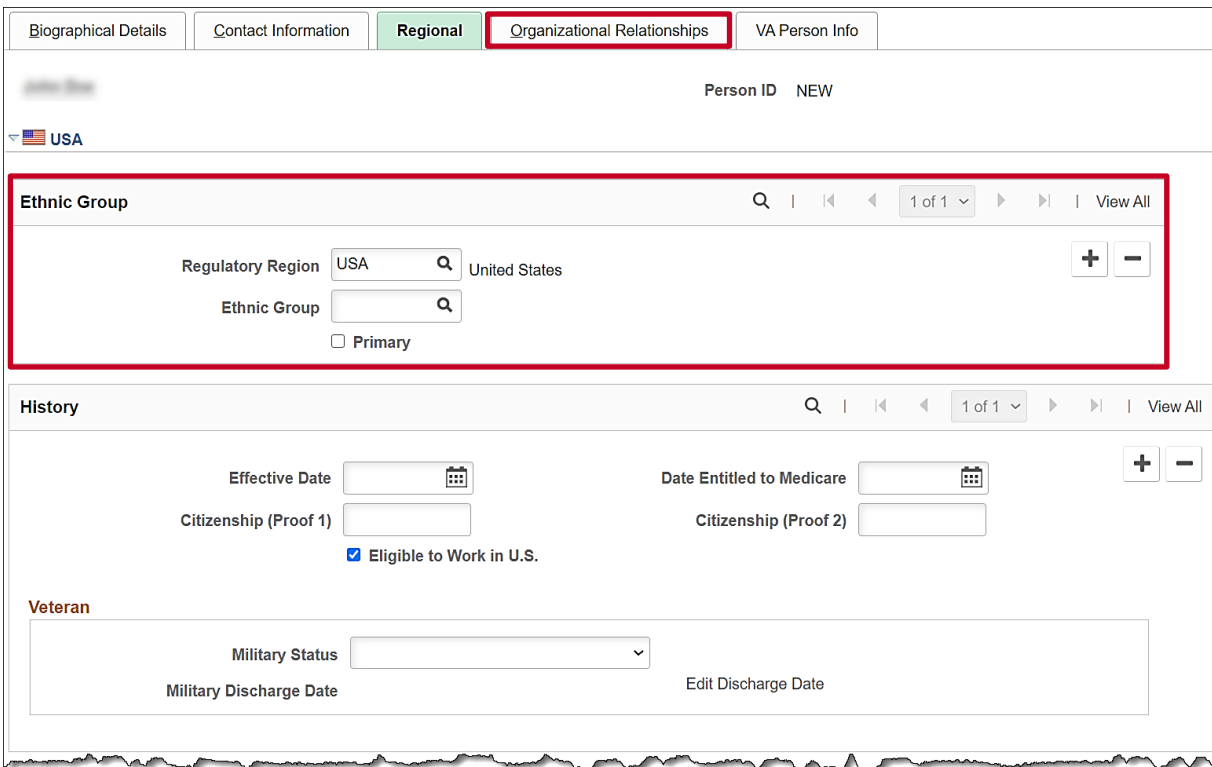
*IM Protocol	*IM Domain	*Network ID	Preferred		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	+	-

[Biographical Details](#) | 
 [Contact Information](#) | 
 [Regional](#) | 
 [Organizational Relationships](#) | 
 [VA Person Info](#)

43. Complete the **Email Option Selection** and **Email Addresses** sections based on the following guidelines:
- If the employee has been issued a business email:
    - Accept the default email option of “Agency Provided Email”
    - Select an email type of “Business” using the **Email Type** field drop-down button
    - Enter the applicable email address in the **Email Address** field
    - Select the **Preferred** checkbox option
  - If the employee’s business email has been requested but not yet assigned:
    - Select the “Pending Agency Provided Email” email option by clicking the corresponding radio button option
    - Select an email type of “Business” using the **Email Type** field drop-down button
    - Enter [Noemail@virginia.gov](mailto:Noemail@virginia.gov)
    - Select the **Preferred** checkbox option
  - If a business email will not be provided to the employee:
    - Select the “Employee Provided Email” email option by clicking the corresponding radio button option
    - Select an email type of “Personal” using the **Email Type** field drop-down button
    - Enter the applicable email address in the **Email Address** field
    - Select the **Preferred** checkbox option

44. Click the **Regional** link at the bottom of the page.

The **Regional** tab displays.



The screenshot shows the HR352 form with the following sections:

- Navigation Tabs:** Biographical Details, Contact Information, **Regional** (highlighted), Organizational Relationships (highlighted with a red box), VA Person Info.
- Person ID:** NEW
- Country:** USA
- Ethnic Group Section (highlighted with a red box):**
  - Regulatory Region: USA (dropdown), United States (text)
  - Ethnic Group: (dropdown)
  - Primary: ☐
- History Section:**
  - Effective Date: (calendar icon)
  - Date Entitled to Medicare: (calendar icon)
  - Citizenship (Proof 1): (text)
  - Citizenship (Proof 2): (text)
  - Eligible to Work in U.S.: ☒
  - Veteran Section:**
    - Military Status: (dropdown)
    - Military Discharge Date: (text)
    - Edit Discharge Date: (text)

45. Complete the **Ethnic Group** section (optional).

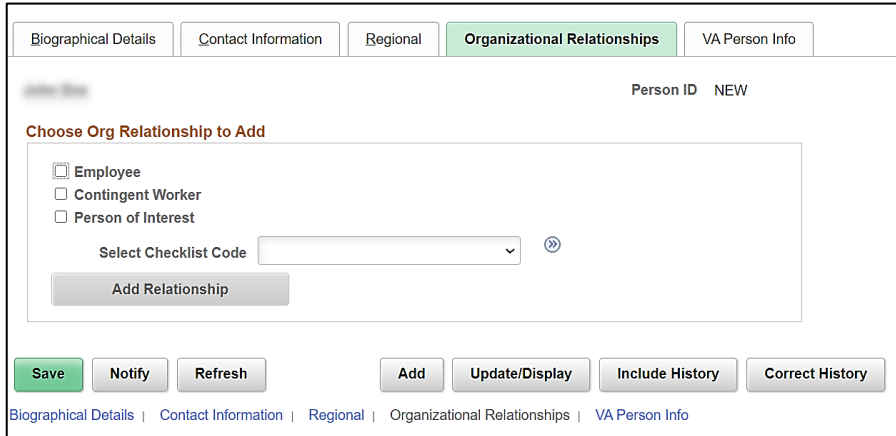
46. The **Regulatory Region** field defaults to “USA”. Do not change.

47. Select the employee’s ethnic group using the **Ethnic Group Look Up** icon (optional).

**Note:** If the employee identifies with multiple ethnic groups, click the **Add a New Row** icon (+) and repeat this step as needed.

48. The remaining sections on this tab are not currently utilized by Cardinal. Click the **Organizational Relationships** tab.

The **Organizational Relationships** tab displays.



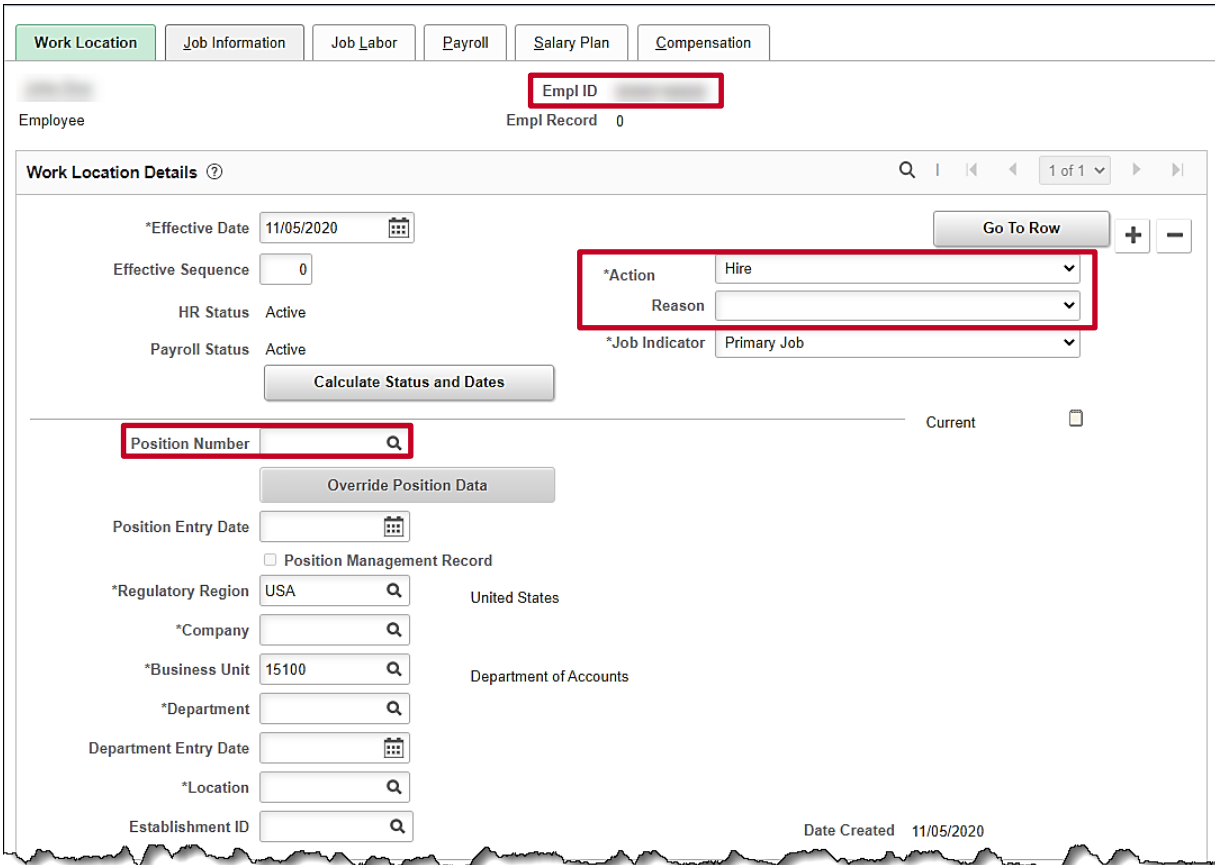
The screenshot shows the 'Organizational Relationships' tab selected in a web application. At the top, there are five tabs: 'Biographical Details', 'Contact Information', 'Regional', 'Organizational Relationships' (highlighted in green), and 'VA Person Info'. Below the tabs, the text 'Person ID NEW' is visible. The main content area is titled 'Choose Org Relationship to Add'. It contains three checkboxes: 'Employee' (checked), 'Contingent Worker', and 'Person of Interest'. Below these is a 'Select Checklist Code' dropdown menu with a blue double arrow icon to its right. At the bottom of this section is an 'Add Relationship' button. Below the main content area, there is a row of buttons: 'Save' (green), 'Notify', 'Refresh', 'Add', 'Update/Display', 'Include History', and 'Correct History'. At the very bottom, a breadcrumb trail reads: 'Biographical Details | Contact Information | Regional | Organizational Relationships | VA Person Info'.

49. Select the **Employee** checkbox option.

50. Click the **Add Relationship** button.

## HR352 Completing a New Hire

The new employee's **Job Record** page displays with the **Work Location** tab displayed by default.



The screenshot shows the 'Work Location' tab selected. The 'Empl ID' field is highlighted with a red box. The 'Work Location Details' section shows fields for Effective Date (11/05/2020), Effective Sequence (0), HR Status (Active), Payroll Status (Active), and Action (Hire). The 'Position Number' field is highlighted with a red box. The 'Regulatory Region' is set to USA, and the 'Business Unit' is 15100. The 'Date Created' is 11/05/2020.

51. The **Effective Date** field defaults to the date entered on the **Personal Information** page. This is a required field. Validate that this date is the first date of employment for the employee (correcting if necessary) prior to saving the job record. A help desk ticket request is required to adjust the new employee's effective date after their job record is created and saved.

**Note:** For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

52. Review the **Empl ID** field and make note of the assigned Employee ID.
53. The **Action** field defaults to "Hire"; no other selections are available.
54. Select "New Hire" in the **Reason** field using the dropdown button.
55. Select the applicable pooled position for the employee using the **Position Number Look Up** icon.



## Human Resources Job Aid

### HR352 Completing a New Hire

The **Work Location** tab refreshes and auto-populates based off the selected Position Number.

Work Location | **Job Information** | Job Labor | Payroll | Salary Plan | Compensation

Empl ID [redacted]  
Employee Empl Record 0

Work Location Details ?

\*Effective Date 11/05/2020 Go To Row + -

Effective Sequence 0 \*Action Hire

HR Status Active Reason New Hire

Payroll Status Active \*Job Indicator Primary Job

Calculate Status and Dates

Position Number BCCHR002 Security Manager I Current

Override Position Data

Position Entry Date 11/05/2020 Position Management Record

Regulatory Region USA United States

Company BCC Bland Correctional Center

Business Unit 71800 Bland Correctional Center

Department 100 BLAND CORRECTIONAL CENTER

Department Entry Date 11/05/2020

Location CENTR Dept of Corrections

Establishment ID DOC Dept of Corrections Date Created 11/12/2020

56. Click the **Job Information** tab.

The **Job Information** tab displays.

Work Location | **Job Information** | Job Labor | Payroll | Salary Plan | Compensation

Empl ID [redacted]  
Employee Empl Record 0

Job Information Details ?

Effective Date 11/05/2020 Go To Row

Effective Sequence 0 Action Hire

HR Status Active Reason New Hire

Payroll Status Active Job Indicator Primary Job

Current

Job Code 96615 Security Manager I

Entry Date 11/05/2020 SOC Code

Supervisor Level Supervisor Name

Reports To DOCHR001 Test-Director of Corrections 00900018800 Billy Cryrus

Regular/Temporary Regular Full/Part Part-Time

Empl Class [redacted] \*Officer Code None

Regular Shift Not Applicable Shift Rate

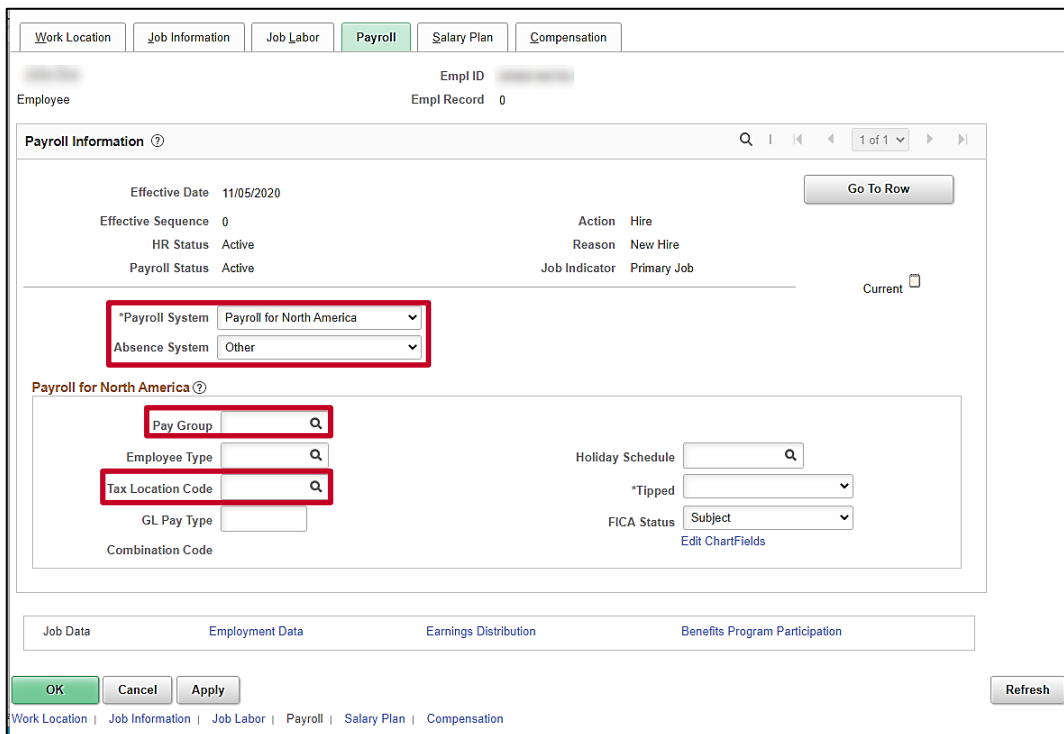
Classified Ind Unclassified Shift Factor

57. Review the information within the **Job Information Details** section.

## HR352 Completing a New Hire

58. Select the applicable employee class using the **Empl Class** field dropdown button. This is a required field.
  - a. If the employee is assigned to a TLC position, select the “TLC EE” value.
  - b. If the employee is assigned to an HBO position, select the value that describes the employee filling the job. (i.e., ONC, OTO, etc.)
59. The **Officer Code** field defaults to “None”. Do not change.
60. The **Job Labor** tab is not utilized in Cardinal. Click the **Payroll** tab.

The **Payroll** tab displays.



Work Location | Job Information | Job Labor | **Payroll** | Salary Plan | Compensation

Employee ID: [Redacted] Empl Record: 0

**Payroll Information** ⓘ

Effective Date: 11/05/2020 Go To Row

Effective Sequence: 0 Action: Hire

HR Status: Active Reason: New Hire

Payroll Status: Active Job Indicator: Primary Job

Current ☐

\*Payroll System: Payroll for North America ▼

Absence System: Other ▼

**Payroll for North America** ⓘ

Pay Group: [Redacted] ⓘ

Employee Type: [Redacted] ⓘ

Tax Location Code: [Redacted] ⓘ

GL Pay Type: [Redacted]

Combination Code: [Redacted]

Holiday Schedule: [Redacted] ⓘ

\*Tipped: [Redacted] ▼

FICA Status: Subject ▼

[Edit ChartFields](#)

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

OK Cancel Apply Refresh

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

61. The **Payroll System** field defaults to “Payroll for North America”. Do not change.
62. The **Absence System** field defaults to “Other”. Do not change.
63. Select “MNP Non-Payroll” using the **Pay Group Look Up** icon.



## Human Resources Job Aid

### HR352 Completing a New Hire

The **Payroll** tab refreshes.

Work Location | Job Information | Job Labor | **Payroll** | **Salary Plan** | Compensation

Employee ID [REDACTED]  
Empl Record 0

**Payroll Information** ?

Effective Date 11/05/2020  
Effective Sequence 0  
HR Status Active  
Payroll Status Active

Action Hire  
Reason New Hire  
Job Indicator Primary Job

Go To Row

\*Payroll System Payroll for North America  
Absence System Other

**Payroll for North America** ?

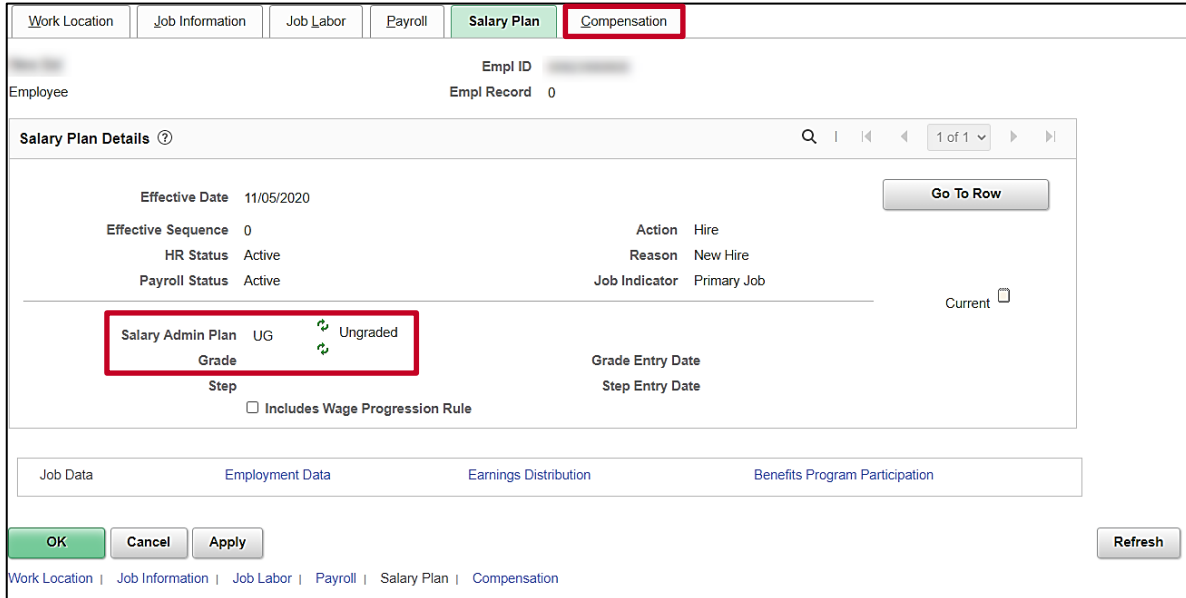
Pay Group MNP Non-Payroll  
Employee Type S Salaried  
Tax Location Code  
GL Pay Type  
Combination Code

Holiday Schedule NOHOL LOCALITY

FICA Status Subject  
[Edit ChartFields](#)

64. The **Employee Type** field defaults to “S” (Salaried). Do not change.
65. The **Holiday Schedule** field defaults to “NOHOL”. Do not change.
66. Select the applicable Tax Location Code based on the location of the office using the **Tax Location Code Look Up** icon.
67. Click the **Salary Plan** tab.

The **Salary Plan** tab displays.



Work Location | Job Information | Job Labor | Payroll | **Salary Plan** | **Compensation**

Employee ID: [Redacted] Empl ID: [Redacted]  
Empl Record: 0

**Salary Plan Details** ②

Effective Date: 11/05/2020  
Effective Sequence: 0  
HR Status: Active  
Payroll Status: Active

Action: Hire  
Reason: New Hire  
Job Indicator: Primary Job

Go To Row

Salary Admin Plan: UG Ungraded  
Grade: [Redacted]  
Step: [Redacted]

Grade Entry Date: [Redacted]  
Step Entry Date: [Redacted]

☐ Includes Wage Progression Rule

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

OK Cancel Apply Refresh

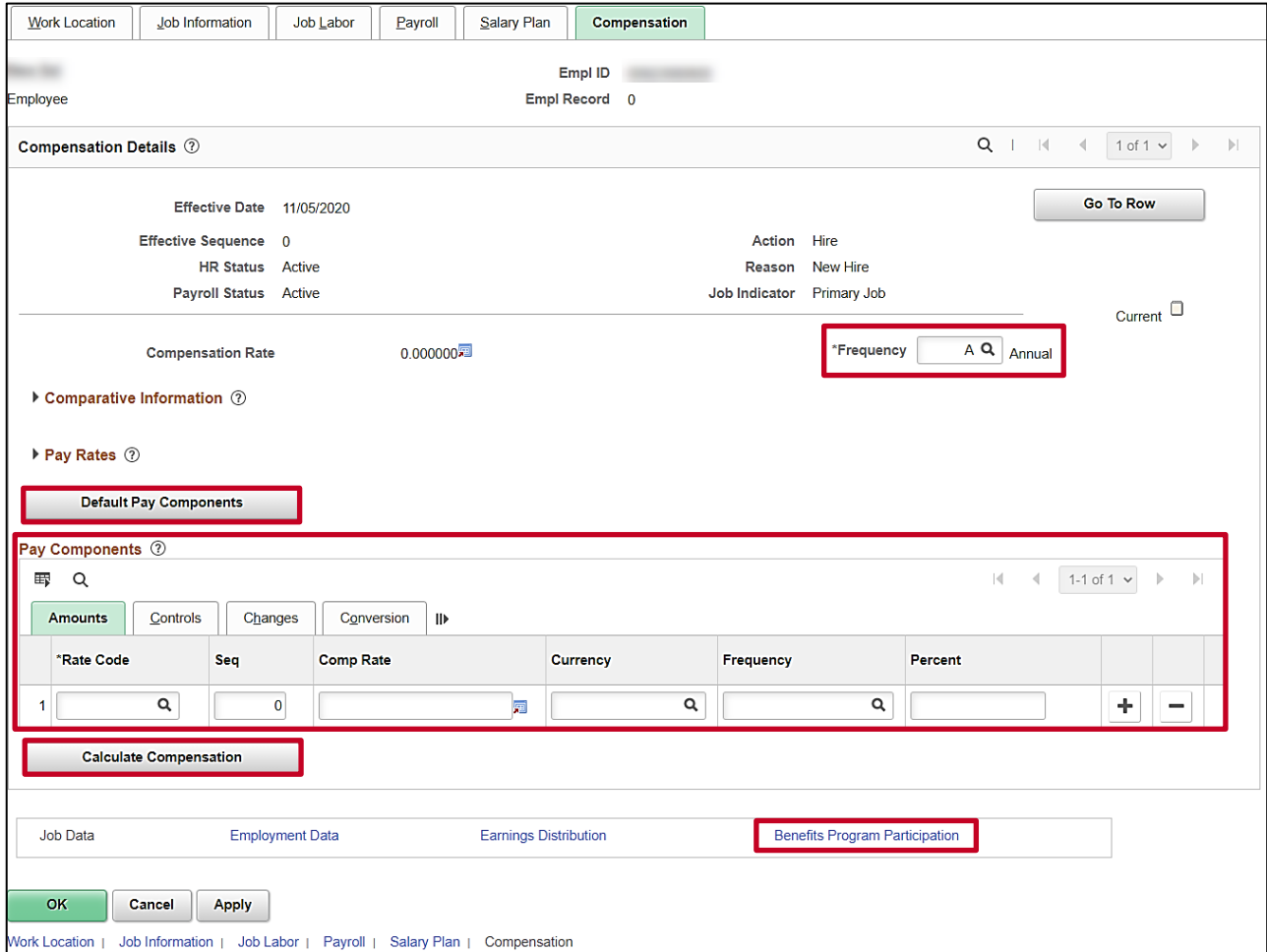
Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

68. Validate that the **Salary Admin Plan** field defaults to “UG” (Ungraded).

69. Click the **Compensation** tab.



The **Compensation** tab displays.



Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

Employee [Redacted] Empl ID [Redacted]  
Empl Record 0

**Compensation Details** ?

Effective Date 11/05/2020  
Effective Sequence 0  
HR Status Active  
Payroll Status Active

Action Hire  
Reason New Hire  
Job Indicator Primary Job

Go To Row

Compensation Rate 0.000000

\*Frequency A Annual

► **Comparative Information** ?

► **Pay Rates** ?

**Default Pay Components**

**Pay Components** ?

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent		
1	0					+	-

**Calculate Compensation**

Job Data | Employment Data | Earnings Distribution | **Benefits Program Participation**

OK Cancel Apply

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

70. The **Frequency Code** field defaults to "A" (Annual). Do not change.
71. Click the **Default Pay Components** button.
72. Select "NAANNL" in the **Rate Code** field using the **Rate Code Look Up** icon within the **Pay Components** section.
73. Enter "0" in the **Compensation Rate** field. (Payroll is not processed in Cardinal).
74. The **Currency** and **Frequency** fields default based on the Rate Code entered/selected.
75. Click the **Calculate Compensation** button.
76. Click the **Benefits Program Participation** link.



## Human Resources Job Aid

### HR352 Completing a New Hire

The **Benefits Program Participation** page displays.

Benefit Program Participation

Employee

Empl ID

Empl Record 0

Benefit Status ?

Q | < > 1 of 1 > > |

Benefit Record Number 0

Effective Date 11/05/2020

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason New Hire

Job Indicator Primary Job

Go To Row

\*Benefits System Benefits Administration

Annual Benefits Base Rate

USD

Benefits Employee Status Active

ACA Eligibility Details

Benefits Administration Eligibility ?

BAS Group ID

Elig Fld 1

Elig Fld 4

Elig Fld 7

Elig Fld 2

Elig Fld 5

Elig Fld 8

Elig Fld 3

Elig Fld 6

Elig Fld 9

Benefit Program Participation Details ?

Q | < > 1 of 1 > > | View All

\*Effective Date 11/05/2020

Currency Code USD

\*Benefit Program PSX

Sys delivered empty Ben Pgm

Job Data

Employment Data

Earnings Distribution

Benefits Program Participation

OK

Cancel

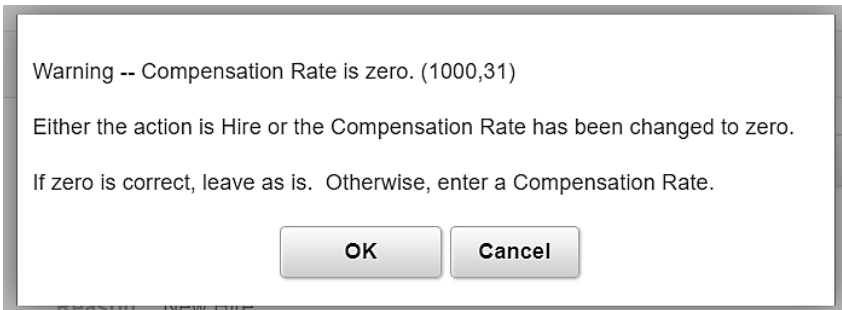
Apply

77. Click the **Elig Fld 2 Look Up** icon. This value will be the department number for example: for position A310000P and/or A310000F the Elig Field 2 will be: 047039000 (the department number).
78. Click the **Elig Fld 3 Look Up** icon and select "N" (No).
79. Click the **Elig Fld 8 Look Up** icon and select "12-12".
80. Click the **Elig Fld 9 Look Up** icon and select the applicable benefits payment breakdown. These values represent the nature of the employee and how the employee's health premiums are paid. Scroll to the bottom of the list to see the valid TLC available values.

**Note:** For further information on eligibility configuration valid values, see the Job Aid titled **BN361 Overview of the Eligibility Configuration Fields**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Training**.

81. Click the **OK** button.

A **Warning** message displays in a pop-up window.



Warning -- Compensation Rate is zero. (1000,31)

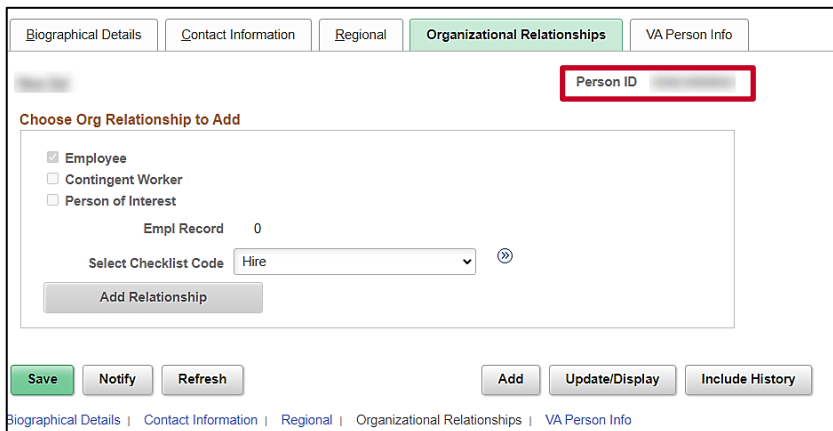
Either the action is Hire or the Compensation Rate has been changed to zero.

If zero is correct, leave as is. Otherwise, enter a Compensation Rate.

**OK** **Cancel**

82. Click the **OK** button to close the **Warning** message. A Compensation Rate of zero is correct because payroll is not managed in Cardinal.

The **Organizational Relationships** page returns.



Biographical Details | Contact Information | Regional | **Organizational Relationships** | VA Person Info

Person ID [redacted]

**Choose Org Relationship to Add**

☒ Employee  
☐ Contingent Worker  
☐ Person of Interest

Empl Record 0

Select Checklist Code Hire

**Add Relationship**

**Save** **Notify** **Refresh** **Add** **Update/Display** **Include History**

Biographical Details | Contact Information | Regional | Organizational Relationships | VA Person Info